VISIT HERTS

GO TO PLACES

Hertfordshire Business Barometer

April 2018

Contents

Key Findings

- Attractions experienced an increase in visitor footfall of **+4.8%** during April 2018 compared to April 2017**,** with **50%** of attractions reporting a stronger performance.

- Additional events have continued to positively impact attractions performance, while poor weather and when of Easter and the Herts Big Weekend fell were cited as factors that negatively impacted performance.

- Serviced accommodation providers saw an increase of **+1%** in occupancy compared to April 2017, while RevPAR was up **+4.3%** compared to April 2017.

- **91%** of visitors to attractions were domestic and **9%** overseas. Out of the overseas visitors, **50%** of attractions reported guests from France as being the most prevalent market.

- In April 2018, the Visit Herts website saw an increase of **+18.3%** in the total number of sessions compared the previous month.

Comparison April 2017/18

Attraction visitor numbers	4.8%	↑
Serviced accommodation- all serviced accommodation occupancy- source: STR Global Ltd	1%	↑

Visit Herts Marketing Update

Digital

In April, the Visit Herts website had **11,304** website sessions and **27,388** total page views.
The Visit Herts social media channels continued to perform well during April. On Facebook we ended the month with **1,084** followers/likes, receiving **17,471** impressions during this period. On Instagram we ended April with **1,099** followers and received **1,197** engagements within with period. On Twitter we ended the month with **1,684** followers, sent out **98** tweets throughout the month and received **85,722** impressions.

Travel Trade

Following the busy travel trade season, this month the travel trade team started to plan activity for the next trade season from September onwards, looking at World Travel Market as the next big show for Visit Herts to attend. Work also begun on sorting trade data for GDPR regulations, along with brainstorming for a new strategy and follow up with shows.

Website

11,304 sessions
1.37 average dwell time
2.42 pages viewed per session

Social Media

1,684 followers

1,084 followers

1,099 followers

Visitor Attractions

Visitor Attractions

Visitor numbers April 2018/2017

2017	2018	% change
98,566	103,326	Up 4.8%

Range of performance

50% of Hertfordshire attractions were up this month, ranging from **+1.6%** up to **+80.7%** up, with **40%** of attractions reporting a reduced footfall, ranging from **-1.3%** down to **-50.5%** down. Alongside this, **10%** of attractions reported their performance remained unchanged.

Attractions up	Attractions down
50%	40%

Performance according to cost April 2018/2017

Charging	Free
Down 5%	Up 60.7%

Performance according to attraction size April 2018/2017

20,000 or less	20,001- 50,000	50,001 -200,000	Over 200,000
Down 1.6%	n/a	Down 0.3%	Up 8.4%

Performance according to attraction location April 2018/2017

Urban	Rural
Up 23.1%	Up 4.2%

Visitor numbers for the year to date (YTD)

Month	2017	2018	% change for month	YTD Totals 2017	YTD Totals 2018	% change for YTD
January	24,139	26,057	Up 7.9%	24,139	26,057	Up 7.9%
February	37,824	38,797	Up 2.6%	61,963	64,854	Up 4.6%
March	68,424	67,281	Down 1.7%	130,387	132,135	Up 1.3%
April	98,566	103,326	Up 4.8%	228,953	235,461	Up 2.8%
May	-	-	-	-	-	-
June	-	-	-	-	-	-
July	-	-	-	-	-	-
August	-	-	-	-	-	-
September	-	-	-	-	-	-
October	-	-	-	-	-	-
November	-	-	-	-	-	-
December	-	-	-	-	-	-
April*	98,566	103,576	Up 5.1%	228,953	339,037	Up 48%

**Please note: The figures in the blue part of the table above are the baseline for all calculations found within this section. The data reported here is strictly 'like for like', excluding figures for attractions that reported they were closed this month or the same month the previous year, or those attractions that have recently begun contributing and cannot provide figures for the previous year. The figures in the grey row include figures from all attractions and are included for reference only.*

Factors affecting visitor attractions

Positive

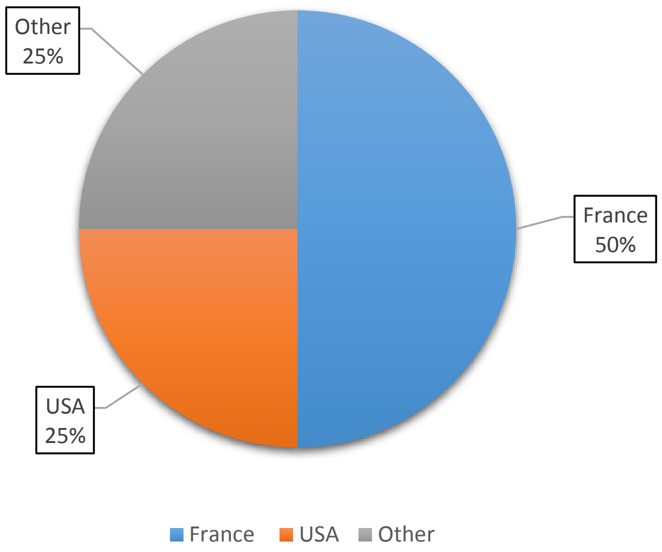
- Additional events hosted compared to April 2017.
- New attractions opened resulting in an increase in visitor footfall compared to April 2017.

Negative

- Negative impact of the wet weather experienced.
- Change in the dates of Easter and the Herts Big Weekend.

Origin of visitors to attractions

- During April 2018, **91%** of visitors to attractions were domestic, **3%** long haul and **6%** European.
- Out of the overseas visitors, **50%** of attractions reported guests from France being their most prevalent market.



Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in April 2018

Hertfordshire Accommodation

Serviced Accommodation

- According to figures from STR Global for **63** larger and chain hotels, accommodation providers experienced an average occupancy of **73.3%.**
- Hertfordshire accommodation providers experienced an increase of **+1%** in occupancy levels compared to April 2017.
- Revenue per available room was up **+4.3%** and average daily rate was up **+3.2%** compared to April 2017.

Year on year room occupancy comparison (%)

Hertfordshire	April 2017	April 2018	April 17/18
Occupancy	72.5%	73.3%	Up 1%

This year … so far (%)

Hertfordshire	Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018	June 2018
Occupancy	64.5%	71.8%	71.7%	73.3%	-	-
	July 2018	Aug 2018	Sep 2018	Oct 2018	Nov 2018	**Dec 2018**
Occupancy	-	-	-	-	-	-

Map showing the locations of serviced accommodation providers that contribute monthly to the Hertfordshire Business Barometer through STR Global.

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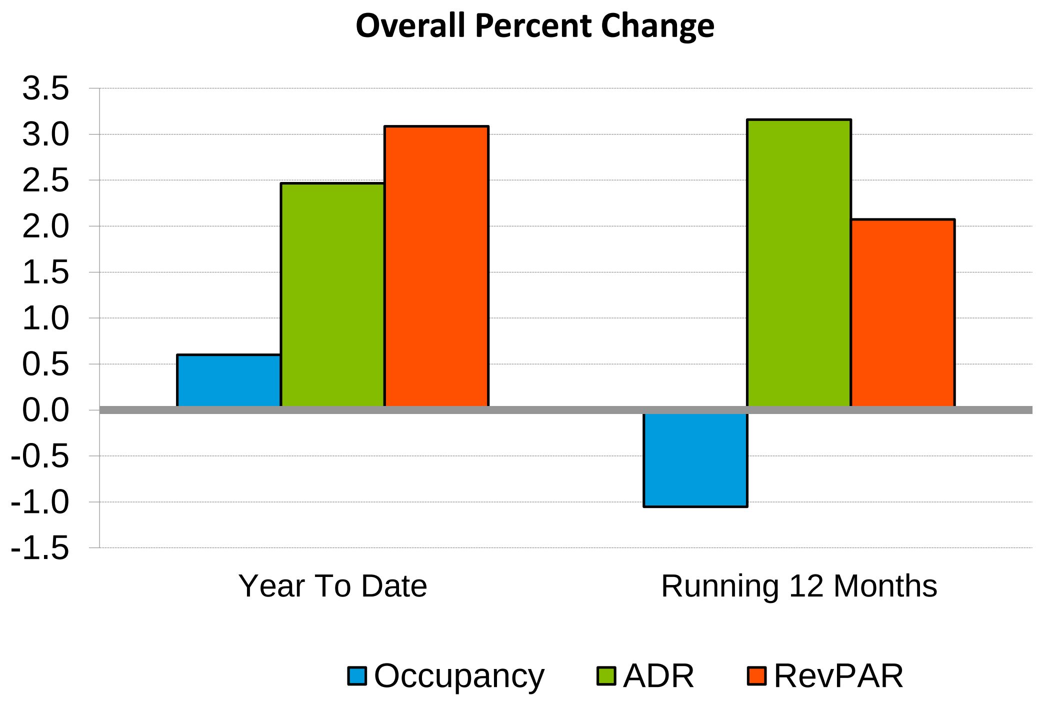
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	April 2017	April 2018	April 17/18
Occupancy	£65.88	£67.99	Up 3.2%

Year on year revenue per available room comparison (%)

Hertfordshire	April 2017	April 2018	April 17/18
Occupancy	£47.79	£49.83	Up 4.3%



Graph showing the overall percentage change in occupancy, average daily rate and revenue available per room both year to date and running 12 months.

Other News

Other News

VisitEngland Occupancy Survey: March 2018 results

Summary of Results

- Room occupancy in March has remained unchanged at 75%, whilst bedspace occupancy decreased by -1% when compared to March 2017 at 53%. The change in room occupancy was led by an increase in room supply of 1.6% compared to an increase of 1.9% in demand compared to the same month in 2017.
- RevPAR, which is the total room revenue divided by the total number of available rooms, increased by 1% in March at £67.96 compared to the previous year.
- City/large town room occupancy was unchanged at 76% whilst bedspace occupancy decreased by -1% to 54%. Seaside was unchanged at 69% for room occupancy and 52% for bedspace occupancy.
- Small town room occupancy increased +1% to 69% and decreased by -1% for bedspace occupancy to 50%, with countryside decreasing -1% for room occupancy to 65% while bedspace occupancy decreased -1% to 45%. Looking at room occupancy rates by establishment size most categories remained relatively unchanged except for 1-25 rooms which decreased by -4% to 68%.
- For bedspace, 1-25 room establishments decreased by -4% to 50%, whilst other categories remained relatively unchanged with changes of 1% or less. Looking at occupancy by region, the largest shift for room occupancy came from Yorkshire & Humberside with a -3% decrease. The other notable shifts were Northwest England and Southwest England increasing by +2%. For bedspace occupancy, Yorkshire & Humberside declined by -3% and Greater London declined by -2%, whereas all other regions remained relatively unchanged with 1% or less change.

To view the full report click here

VisitEngland GB Day visits 2018: April 2018 GB & England

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to April 2018 decreased by -9% when compared with the same period last year, to 402 million.
- The value of those visits decreased by -4% during the same period to £14.9 billion.
- Year to date at the GB level volume decreased by -6% to 530 million and value of visits decreased by -1% to £19.4 billion.
- Looking at England, volume decreased by -10% in the three months to April 2018 at 335 million visits, while value decreased by -4% to £12 billion compared to the same period in 2017.
- Year to date the volume of day visits in England decreased relative to the same period in 2017 by -7%, to 446 million and the value decreased by - 1% compared to the same period in 2017 at £15.8 billion.

3+ Hour Day Visits Summary

- 3+ hour day visits in Great Britain for the three months to April 2018 decreased by -9% to 668 million visits, versus the same period in 2017. The value of these visits increased by +1% for the three months against the same period last year to £21.2 billion.
- Year to date, volume is down by -7% to 882 million 3+ hour visits and value increased by +8% to £28.9 billion.
- In England, volume declined by -10% in the three months to April 2018 to 559 million. However, the value of these visits increased, by +3%, to 17.3 billion. Year to date the volume of day visits in England decreased relative to the same period in 2017 by -7%, to 739.9 million and the value increased by +12% to £24.2 billion.

To view the full report click here

Glossary

VICs- Visitor Information Centres

CTR- Click through rate

AVE- Advertising Value Equivalent

GTOs- Group Travel Organisers

DMOs- Destination Management Organisations

OP- On par

ADR- Average Daily rate

RevPAR- Revenue per available room

YTD- Year to date

Business Barometer Contacts

If you would like to be part of the Business Barometer, or have any questions on its content, please contact

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Previous reports

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Acknowledgements

If you wish to use any figures or information contained within this report, please acknowledge the source as Visit Herts Business Barometer, April 2018. Thank you.